Remarks/Arguments

Reconsideration of this Application is requested.

Claims 1 - 3 and 12-16, have been rejected by the Examiner under 35 USC § 103(a) as being unpatentable over Cerwin (U.S. Publication No. 2002/0188497 A1) in view of Shoemaker et. al. (U.S. Publication No.2003/0167197 A1).

Cerwin discloses the following in paragraph [0015]:

> [0015] A customer's relationship and interaction with an entity (e.g., a bank, service or product provider, etc.) may be multi-faceted. For example, a customer may use one or more of the available delivery channels (e.g., call center, Internet access, branch office, interactive voice response), to access multiple products (e.g., checking, loans, savings, investments), make multiple contacts (e.g., transactions, information requests, complaints), participate in one or more group memberships (e.g., household, business), hold external financial relationships (e.g., insurance, accounts at other financial institutions), and have life events and plans (e.g., children, college education, house addition, vacation, retirement). Further, customers (predominately businesses) may grant trusted third parties access to customer information, which may be common with accountant and financial planning advisor relationships, for example. Capturing, analyzing, distributing, and leveraging information regarding a customer's total perspective provides a business (or other entity) the ability to provide individualized and personalized service. This further enables an entity (e.g., a bank, product provider, service provider, etc.) the ability to customize and personalize information based on the knowledge of comprehensive customer relationships, current services, previous transactions, wants, and needs of the customer.

Cerwin discloses the following in paragraph [0005]:

> [0005] The present invention provides an automated process for gathering and integrating customer profiles in a database, processing update and query requests on the customer profiles, and distributing profile information. Profile information may include transaction history, profitability analysis, customer contact, preferences, demographic data, psychographic profile, relationships to other customers or organizations, channel usage,

and methods of identification and authentication used to recognize the customer at any point of contact.

Cerwin discloses a system for creating a repository of knowledge of customer relationships.

Shoemaker discloses the following in paragraph [0006]:

[0006] In the above manner, the present invention satisfies the need for a customer relationship measurement and management system which provides immediate access to individualized survey results and offers recommended action plans based upon the survey results. These and other features, aspects, and advantages of the present invention will become better understood with reference to the following description.

Shoemaker discloses the following in paragraph [0023]:

[0023] By clicking on the respondent name and choosing the view/edit respondent data option 72, a respondent data page 80 is displayed. An exemplary respondent data page 80 is shown in FIG. 4. The respondent data page includes contact information 81 for the respondent including name, address, phone number, and e-mail. In addition, the respondent data page allows the user to define the language the respondent speaks under language option 82. This language will be used when the respondent is contacted by the system 20 and requested to participate in a market research survey. If the respondent agrees to participate, the survey is also provided to the respondent in this language. Below the respondent contact information 81, the user is provided with the option to update the respondent data 84, cancel any new data entered 86, return to the account information page 88, or return to the account listing page 90. The respondent information table 70 is also shown on the bottom of the respondent data page 80.

Shoemaker discloses the following in paragraph 0029.

[0029] As shown in FIG. 10., the first step 170 of the survey translation process is completion of a final version of a survey in the English language. In the next step 171, the English language survey is entered into the system 20 and stored in one of the system databases 28 using a web survey tool (not shown). After the survey is checked for accuracy and completeness in step 172, various languages are associated with the survey for translation purposes in step 173. These languages correspond to languages to

> be associated with various respondents that will be requested to complete the survey. After desired translation languages are associated with the survey, the survey is flagged as a "pending translation" in the database 28 in step 174. Next, in step 175, translators are notified via e-mail that a survey needs to be translated. The translators are responsible for translating the entire survey including all survey questions, scales, introduction materials, and section comments from the default language (i.e., English) to the additional native language(s) associated with the survey. The e-mail messages sent to the translators include a link to a translation tool (not shown) and authentication and access codes for accessing the translation tool.

Shoemaker discloses the following in paragraph 0027.

> [0027] Respondents use one of the remote computers 24 to access the surveys by entering the URL address in their browser or, if a URL link is provided with an e-mail invitation, the respondent simply clicks on the URL link within the e-mail invitation. After arriving at the URL address and entering the appropriate identification and authentication information, if any, the respondent is provided access to the customer survey tool 32. Once the respondents access the customer survey tool 32, the respondents are lead through various pages of a customer satisfaction survey 34 (also referred to herein as an "on-line survey"). Each respondent's answers are stored within the databases 28 when the respondent completes the on-line survey. A page from an exemplary survey 34 is shown in FIG. 5. The survey asks questions in the area of customer loyalty and satisfaction, including questions concerning the customers perception of the company in the areas of value, quality, and price of the company products and/or services. The survey 34 accepts multiple choice answers from the respondents based upon their experience with the company. In addition, the survey may allow respondents to enter text answers and comments to certain questions.

Shoemaker provides individual survey results and offers recommend plans based on the survey results.

Cerwin and Shoemaker taken separately or together do not disclose or anticipate steps c, d and e of claim 1 and those claims dependent thereon, namely, c) accessing a database that stores information about various users including weights assigned by the various users; d) accessing a database of information relating to

relationships between an enterprise and other parties wherein said information includes a value of said relationship to said enterprise, a quality of said relationship to said enterprise and the weights assigned by the various users; and e) if a record relating to said party exists in said database, providing information relating to a relationship between said enterprise and said party to said user.

Regarding claims 12-16.

Shoemaker discloses the following in paragraph 0017.

> [0017] One embodiment of the present invention is now described in more detail with reference to the above figures. As shown in FIG. 1, a Customer Relationship Measurement and Management System 20 includes a central computer 22 (e.g., a server) linking various remote computers 24 via a network such as the Internet 26. The central computer is controlled by a market research firm and hosts an Internet website which provides a company with an account management software tool 30. The central computer also hosts a website which provides the company's customers with access to a customer survey tool 32. Both the account management tool 30 and the customer survey tool 32 are software tools written in hypertext markup language (html), or other language commonly found for world-wide-web applications, and both are accessible by authorized users via remote computers 24 connected to the Internet. The central computer 22 has access to a plurality of databases 28 which contain information about the company and the company's customers. For example, the databases contain information about the company hierarchy from top-level management through individual account managers responsible for particular customer accounts. The databases also contain information about the company's customer accounts and individual contacts that work for those customers. A company account manager is associated with each individual contact in the database.

Cerwin and Shoemaker taken separately or together do not disclose or anticipate steps d2, d3 and d4 of claim 12, and those claims dependent thereon, namely, d2) accessing a database that stores information about various users, including weights to be assigned by various users; d3) access said database for information relating to a relationship between said enterprise and said party that includes a value of said relationship to said enterprise, a quality of said relationship to said enterprise and the weights assigned by various

users; and d4) if a record relating to said party exists in said database, send said information relating to a relationship between said enterprise and said party to said computer.

Claims 6, 17 and 31-34 have been rejected by the Examiner under 35 USC § 103(a) as being unpatentable over Cerwin (U.S. Publication No. 2002/0188497 A1) in view of Shoemaker (U.S. Publication No. 2003/0167197 A1) and further in view of Crockett et. al. (U.S. Publication No. 2004/0039631 A1).

Crockett discloses the following in paragraph [0007]:

> "[04)071 According to some implementations, the computer system can generate an overall assessment of the organization's customer relationship management capabilities using a weighted score of each of the capabilities. The computer system also can generate an assessment of each of the organization's customer relationship management capabilities using a weighted score of each of the capabilities."

Cerwin, Shoemaker and Crockett taken separately or together do not disclose or anticipate steps c, d and e of claim 1, and those claims dependent thereon, namely, c) accessing a database that stores information about various users including weights assigned by the various users; d) accessing a database of information relating to relationships between an enterprise and other parties wherein said information includes a value of said relationship to said enterprise, a quality of said relationship to said enterprise and the weights assigned by the various users; and e) if a record relating to said party exists in said database, providing information relating to a relationship between said enterprise and said party to said user.

Cerwin, Shoemaker and Crockett taken separately or together do not disclose or anticipate steps d2, d3 and d4 of claim 12, and those claims dependent thereon, namely, d2) accessing a database that stores information about various users, including weights to be assigned by various users; d3) access said database for information relating to a relationship between said enterprise and said party that includes a value of said relationship to said enterprise, a quality of said relationship to said enterprise and the weights assigned by various users; and d4) if a record relating to said party exists in said database, send said information relating to a relationship between said enterprise and said party to said computer.

The art cited by the Examiner does not disclose or anticipate utilizing the weights assigned by the various users as weighted sums of the various users are responses to statements pertaining to various characteristics as claimed in claim 31.

The art cited by the Examiner does not disclose or anticipate having the characteristics include commitment, trust and satisfaction as claimed in claim 32.

The art cited by the Examiner also does not disclose or anticipate having the weights assigned by the various users to be weighted sums of the users responses to statements, pertaining to various characteristics as claimed in claim 33.

Claims 7 and 18 have been rejected by the Examiner under 35 USC § 103(a) as being unpatentable over Cerwin in view of Shoemaker and further in view of Parker (U.S. Publication No. 2002/0052774 A1).

Parker discloses the following in [0032]:

> "[0032) GUI 72 includes actions area 74, recent surveys area 76, and indicators area 78. Actions area 74 provides various options that relate to running a survey. As is the case with all of the options described herein, each of the options shown in FIG. 4 may be selected by pointing and clicking on that option. Briefly, option 80 generates and runs a survey. Option 82 examines, modifies or runs previously generated surveys. Option 84 displays information relating to a survey. Option 86 displays system leverage points. Option 88 displays survey responses graphically using, e.g., charts and graphs. Option 90 views customer (respondent) information from a survey according to demographics. That is, option 90 breaks-down survey responses according to the demographic information of a customer/respondent."

Parker discloses the ability of a user to use various options to preview survey results.

Cerwin, Shoemaker and Parker taken separately or together do not disclose or anticipate steps c, d and e of claim 1, and those claims dependent thereon, namely, c) accessing a database that stores information about various users including weights assigned by the various users; d) accessing a database of information relating to relationships between an enterprise and other parties wherein said information includes a value of said relationship to said enterprise, a quality of said relationship to said enterprise and the weights assigned by the various users; and e) if a record relating to

said party exists in said database, providing information relating to a relationship between said enterprise and said party to said user.

Cerwin, Shoemaker and Parker taken separately or together do not disclose or anticipate steps d2, d3 and d4 of claim 12, and those claims dependent thereon, namely, d2) accessing a database that stores information about various users, including weights to be assigned by various users; d3) access said database for information relating to a relationship between said enterprise and said party that includes a value of said relationship to said enterprise, a quality of said relationship to said enterprise and the weights assigned by various users; and d4) if a record relating to said party exists in said database, send said information relating to a relationship between said enterprise and said party to said computer.

Claims 8, 10, 11, 19, 21 and 22 have been rejected by the Examiner under 35 USC § 103(a) as being unpatentable over Cerwin in view of Couchot et. al.

Couchot discloses the following in paragraph [0005]:

> "[0005] According to one embodiment of the present invention, reporting performance data includes receiving at least one client data rating generated from performance data comprising client data gathered from a client. At least one provider data rating generated from performance data comprising provider data gathered from a provider is received. The at least one client data rating and the at least one provider data rating to the client are reported."

Couchot discloses the reporting of performance data.

Cerwin and Couchot taken separately or together do not disclose or anticipate steps c, d and e of claim 1 and those claims dependent thereon, namely, c) accessing a database that stores information about various users including weights assigned by the various users; d) accessing a database of information relating to relationships between an enterprise and other parties wherein said information includes a value of said relationship to said enterprise, a quality of said relationship to said enterprise and the weights assigned by the various users; and e) if a record relating to said party exists in said database, providing information relating to a relationship between said enterprise and said party to said user.

Cerwin and Couchot taken separately or together do not disclose or anticipate steps d2, d3 and d4 of claim 12, and those claims dependent thereon, namely, d2)

accessing a database that stores information about various users, including weights to be assigned by various users; d3) access said database for information relating to a relationship between said enterprise and said party that includes a value of said relationship to said enterprise, a quality of said relationship to said enterprise and the weights assigned by various users; and d4) if a record relating to said party exists in said database, send said information relating to a relationship between said enterprise and said party to said computer.

Claims 9 and 20 have been rejected by the Examiner under 35 USC § 103(a) as being unpatentable over Cerwin (U.S. Publication No. 2002/0188497 A1) in view of Couchot et. al. (U.S. Publication No. 2003/0065553 A1) and further in view of Feher (U.S. Publication No. 2004/0002893 A1).

Feher discloses the following in paragraphs [0020] and [0027]:

> "[0020] The preferred embodiment uses a variety of data-input devices to collect past, current, and potential customer data. Among the methods may be data collected via customer service representative on the telephone 10, or via a customer service web site 10; data already stored on an existing customer relationship management infrastructure, such as Reynolds and Reynolds 20; data gathered via sweepstakes kiosk 30; data obtained from a dealer web site 40, a third party web site 50, or a third party database 60.
>
> [0027] 3rd Party database 60 are customer information data directly obtained from third party marketing databases. Ideally, these databases will include information from an appropriate, relatively "localized" third party database, so that the dealership will have some basic information about potential customers who come to the dealership, even if those potential customers have not provided any information at all. These third party databases include companies such as www.polk.com that provide dealerships with databases that they have refined, filtered, or applied a predictive modeling matrix to better equip the dealer with targeting information. This refined database after importation into the consolidated customer relationship management/ASP 100 will be used for direct mail and/or phone campaigns. Again, the consolidated customer relationship management/ASP 100 will provide the platform for the process delivery."

Feher discloses third party databases. However, Feher does not disclose that the data will be collected and distributed by the third party in a secure manner to protect critical confidential information of the enterprise.

The art cited by the Examiner also does not disclose or anticipate new claims 31-34.

In view of the above claims 1-3, 6-21 and 31-34 are patentable. If the Examiner has any questions would he please call the undersigned at the telephone number noted below.

Please charge any additional fees that may be required or credit any overpayment to Deposit Account Number 16-1885.

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